PATRONS

URL to get into your Dashboard page:
Click the link below to access your page.

https://manito-art-league.appsmith.com/app/manito-art-league/pdashboard-698b4f127a023e1c1dbe8bef

On your Dashboard:

- **Click on Patron Maintenance button to get into maintenance of the records**
- **Click on the Reports button to get to the Reports.**

NOTES:

- Data is REAL TIME Data, so make sure what you change is correct for the existing data.
- Deletions are not able to be done at this time. **For any record needing to be deleted, remove the data EXCEPT the Last name, First name.**
- **Patron amount records are able to be deleted- Only in the multiple patron records.**
- This is LIVE, so data integrity is enabled, so if you see it is not updating, someone else may be updating that record. Try again later.

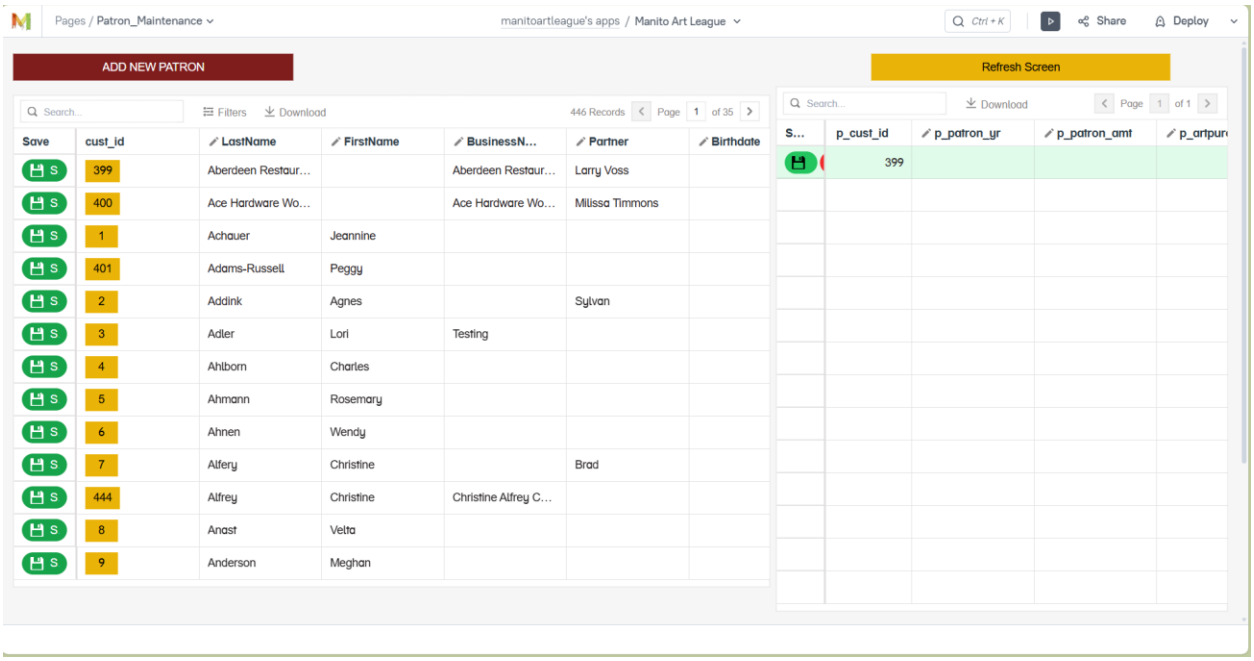
RULES ON ENTRY:

- Entering is case sensitive
- All rows do not need to be entered, but each table **will** create an empty record for future use.
- **DO NOT** use PERIODS or COMMAS!!
- State is two letters ex: **WI**

- **Address** for PO Box is PO Box. Do not separate the PO, no periods. PO Box should be on the first address line. This helps for labels and post office standards.
- IF there is a **PO BOX** address- and other street address – POBox goes in the first address field and Street address goes in the second address field. This is helpful for mailing labels for Post office Regulations- POBox first. If not POB, then street address goes in the first address field.
- Yes or No >**DO NOT USE ALL CAPS** = Yes, NOT YES. (This makes things accurate when reporting)
- Phone format = 715-256-9833 USE DASHES
- For those that are NO LONGER MEMBERS or PATRONS. Change the Yes to No Under Member or Patron and clear the year(Mal YR, Patron YR) next to it.
- **YEAR** = **4 digits**, NOT 2. (2025)
- Volunteer fields are Years, to keep track of what year they can help (XXXX) Im sure we will be making changes to this in time. But we need to be consistent. This is a text field so if we want to make changes in the future we can.
- Business vs people. Business name goes into the LastName, First name will remain blank and Partner field will have the Full Owner Name.

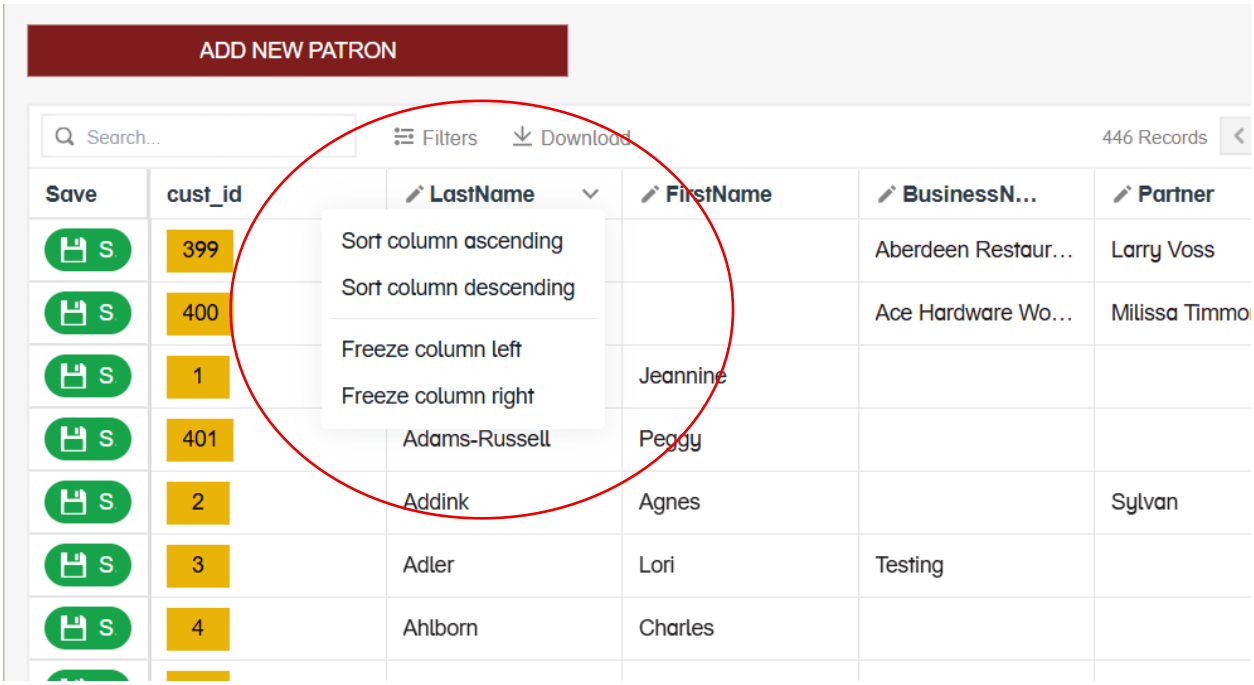
PATRON MAINTENANCE INSTRUCTIONS

Patron Interactive Report- Add, Edit and Delete Records



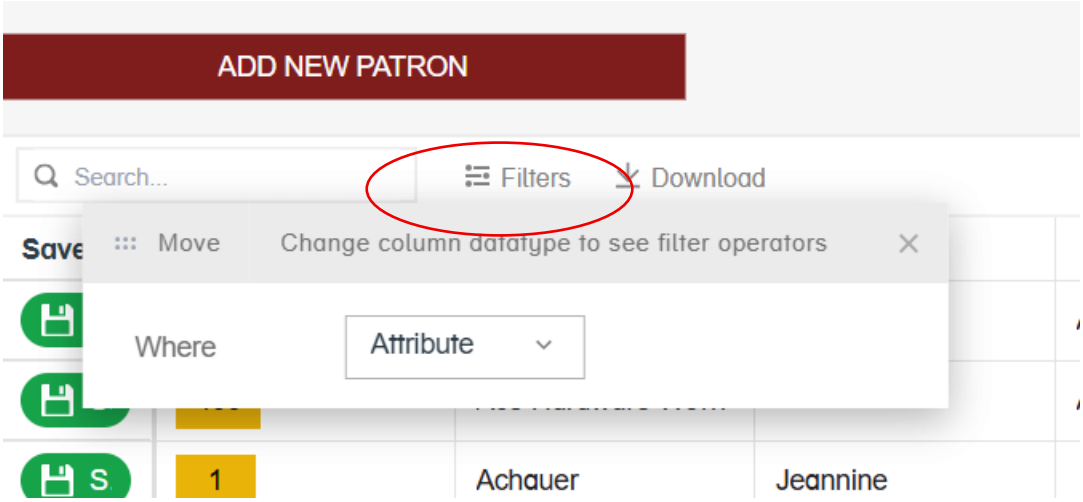
SORTING:

- Click or hover over/on the arrow next to the Field (Up= Ascending, Down=Descending) on any column you want to sort.

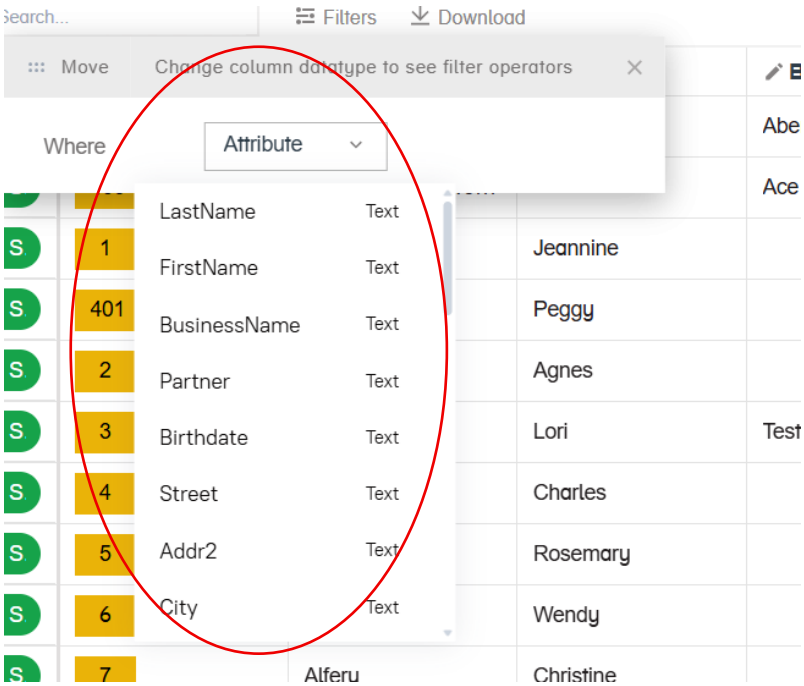


SEARCHING:
For Advanced searching, use the filter
TO FILTER:

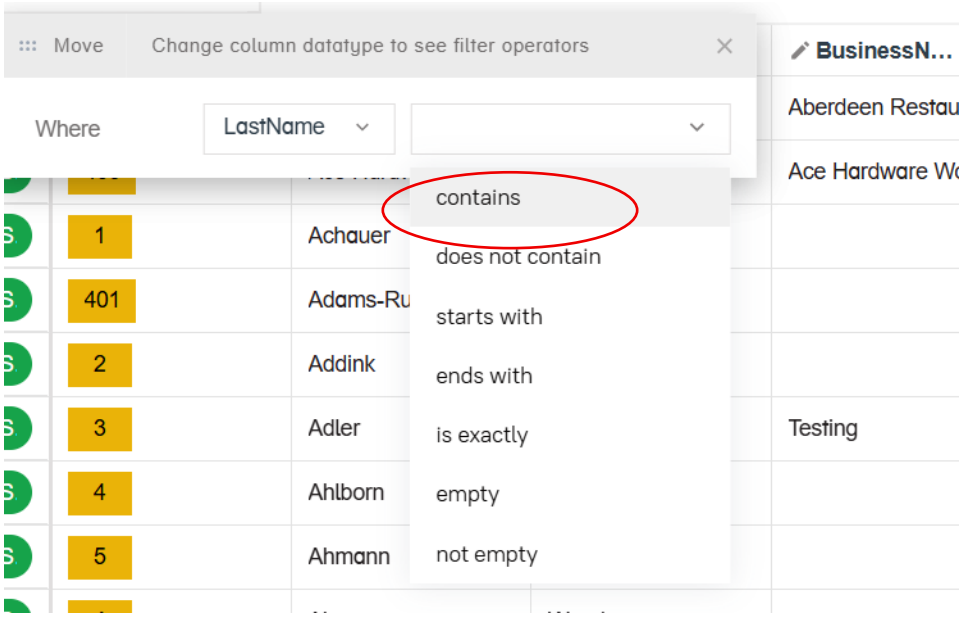
- Click on the filter:
- You have many options here… You can search on any field with specific selections.



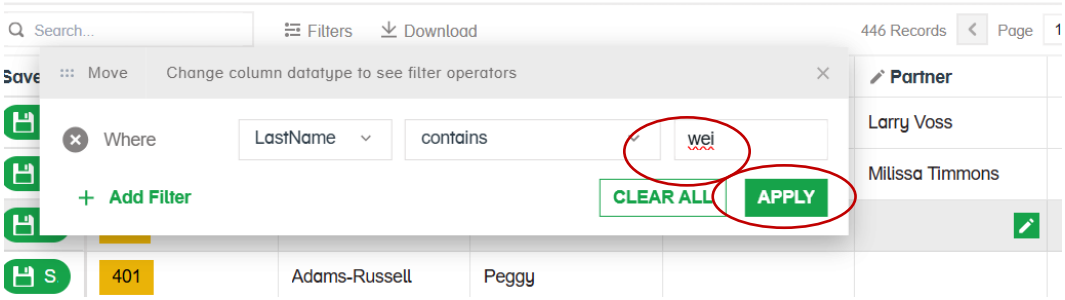
- Select the Attribute (fields/column) you want to find.



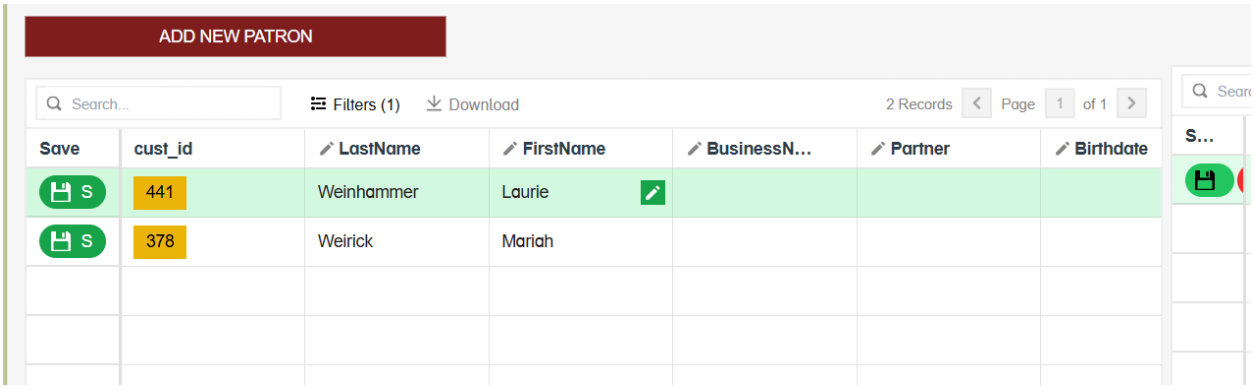
- For Instance, if you want to find a person but not sure on the correct spelling
- You could use “contains”



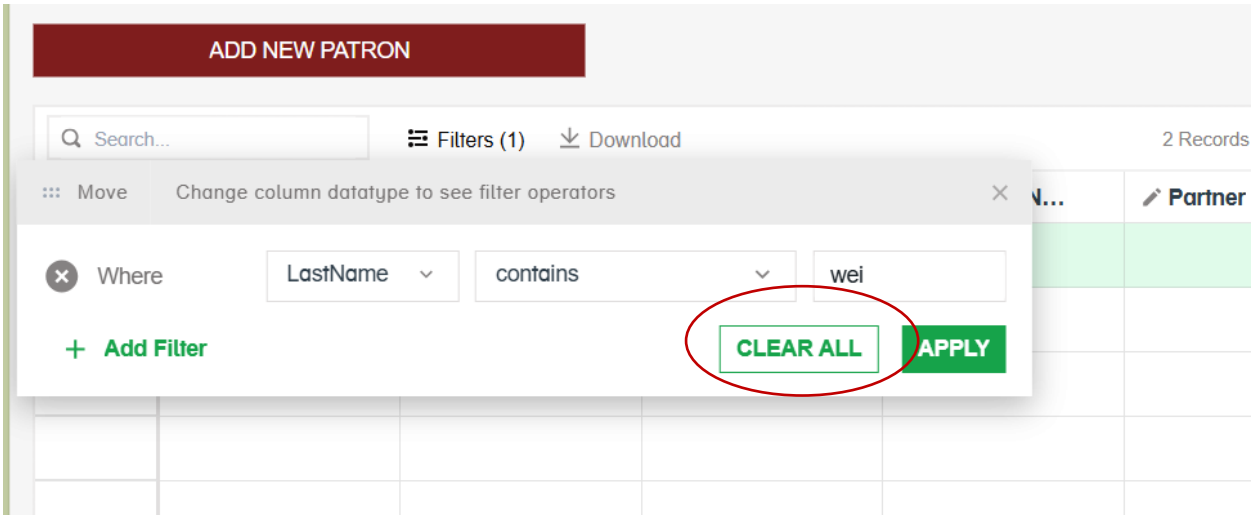
- Enter letters of the lastname of the person you are finding and press Apply.



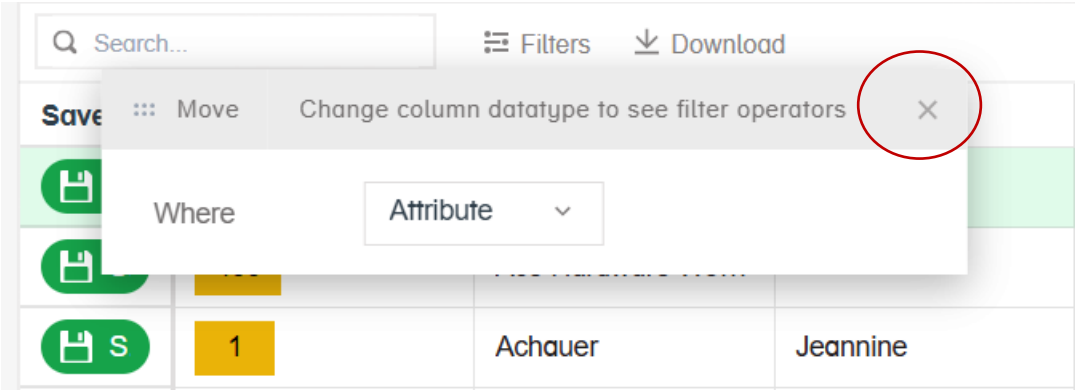
- You will see your results.



- To get back to the full table and see all the records, go back into filters and press CLEAR ALL.
- This will refresh all records back.

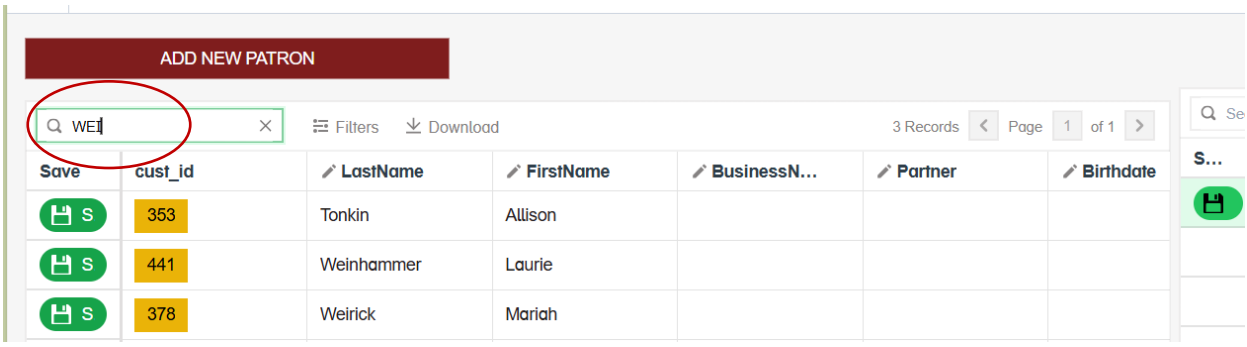


- And then click on the X to get out.

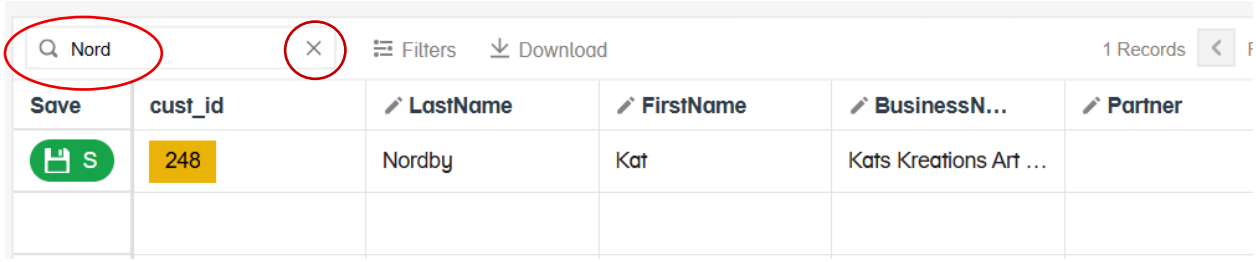


TO USE THE SEARCH BOX: - CustId and LastName for Search Only

- Type in the letters and it will pop in the matching records.

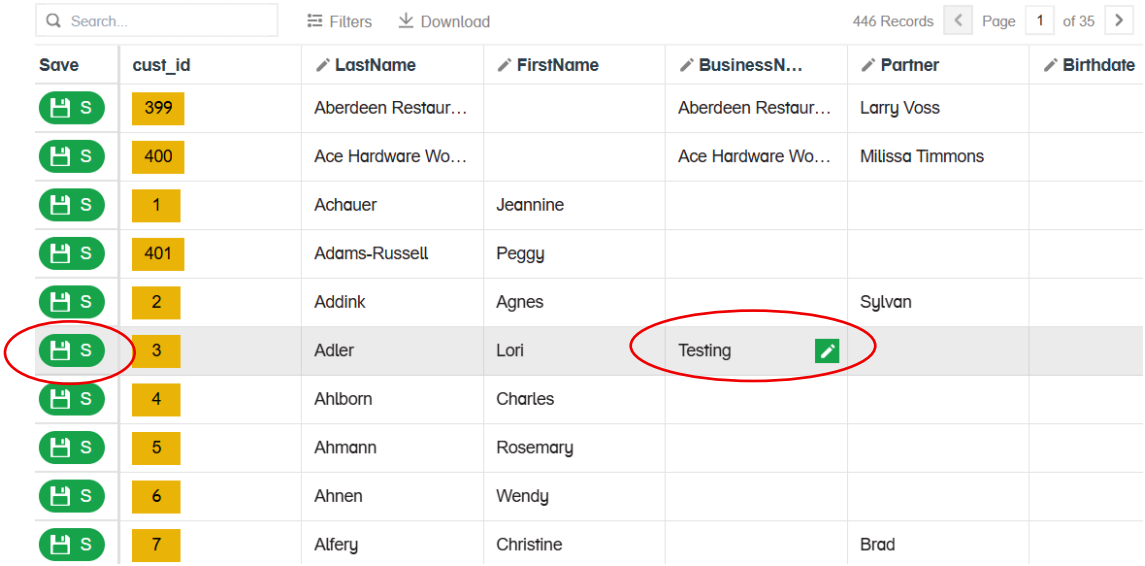


- Same thing happens when you type in the custid
- The more letters you type in, the more the record will pop to the top
- Click on the "x" to clear the selection

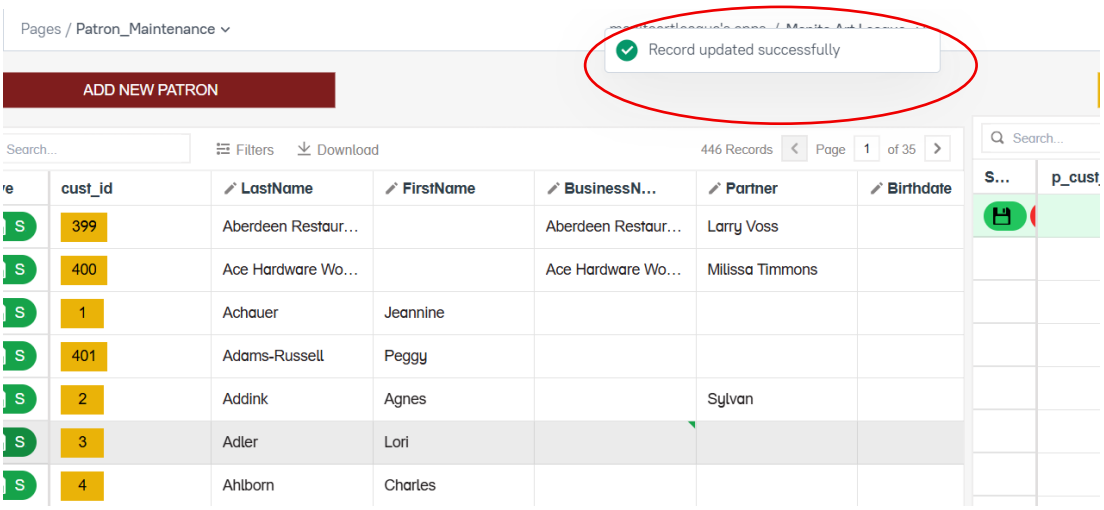


EDITING:

- To EDIT a field, Hover over the column and Click on the Arrow next to the column you are changing.
- Make your changes

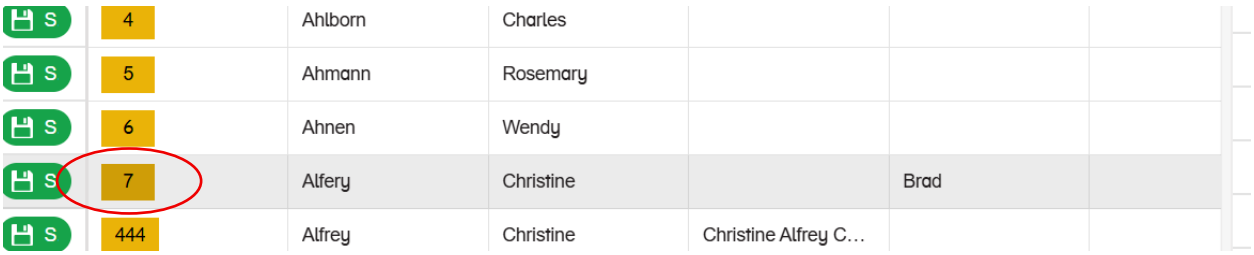


- Click SAVE when done Editing
- Changes saved will display when saved is clicked.
- A pop up Update successfully will appear

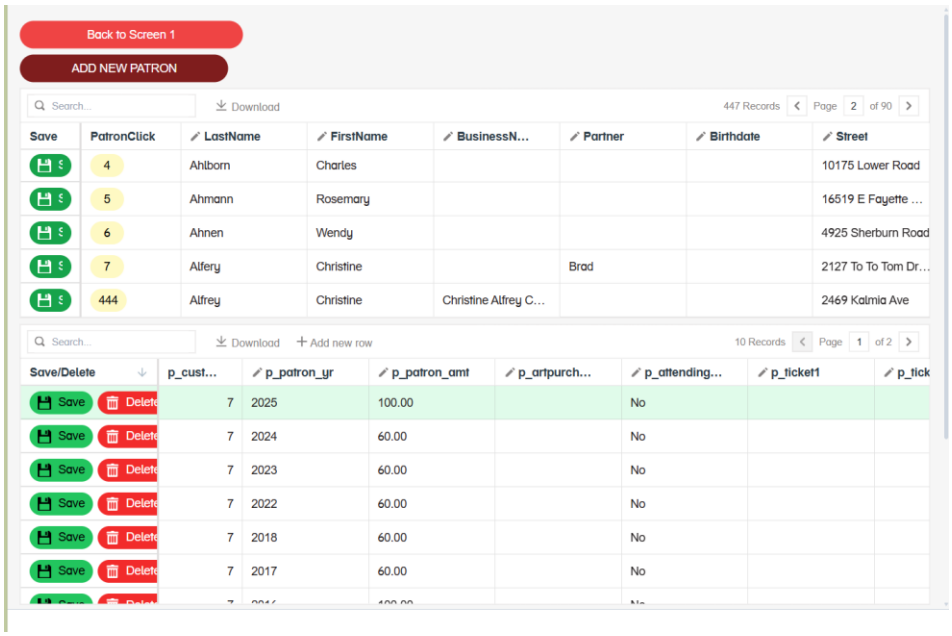


TO FIND THE PATRONS FOR EACH PERSON:

- Click on the custid number…



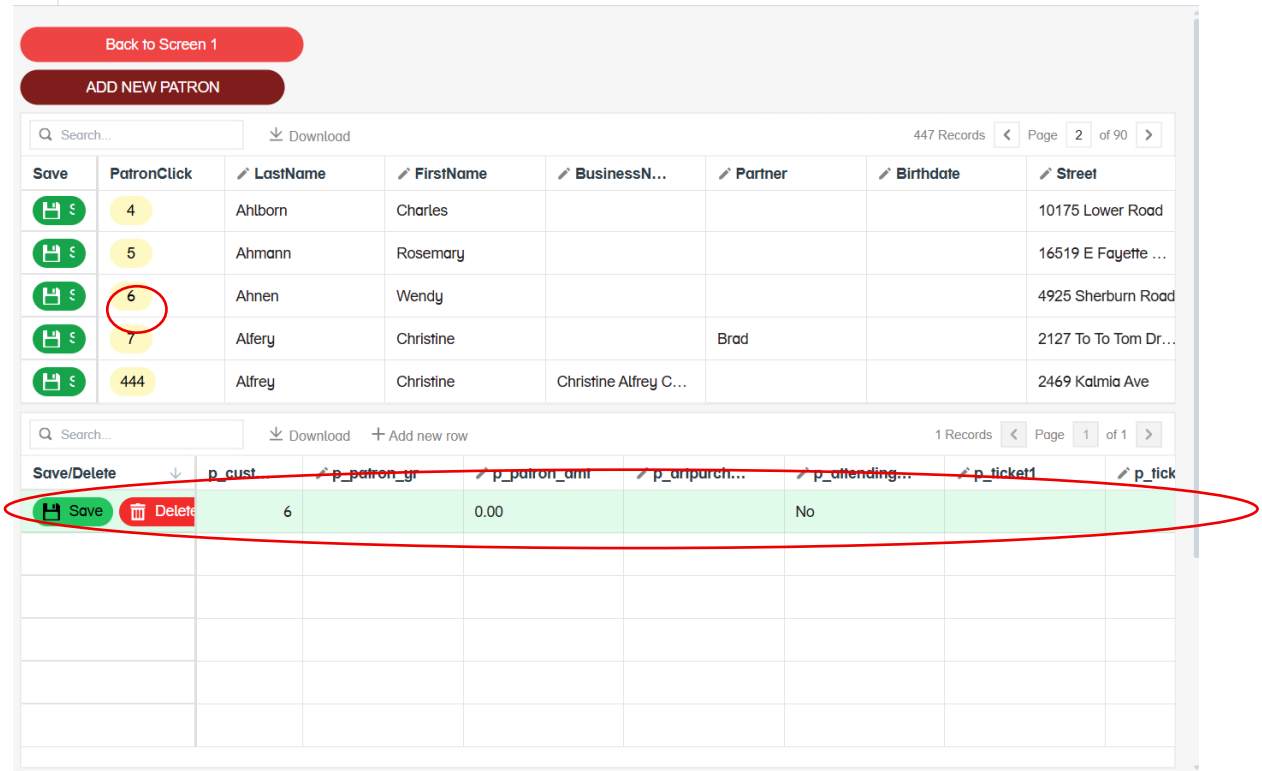
- That will bring in the patron records by descending year order.



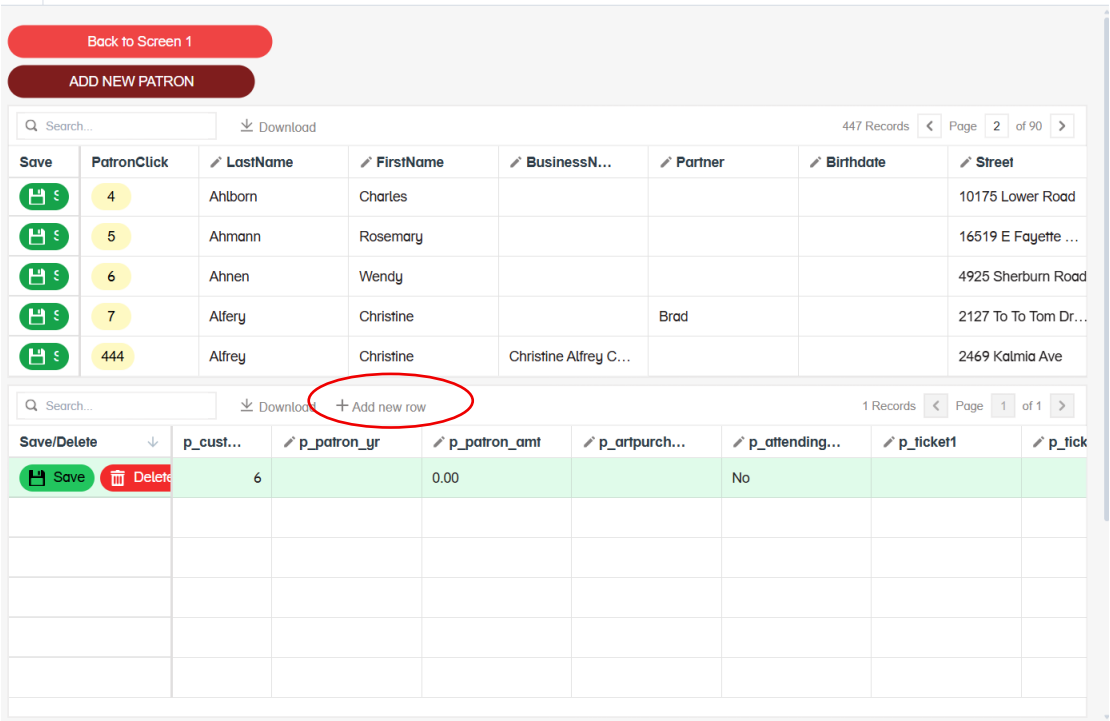
To EDIT, ADD or DELETE a PATRON record:

ADDING ANOTHER PATRON YEAR AND AMOUNT RECORD:

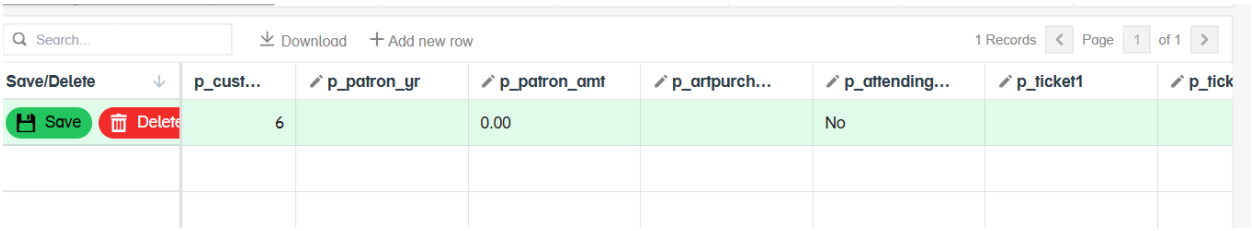
- Click on the Yellow Custid you want to add a patron record to
- You will see the information if any below



- To add a record, click on +Add new row

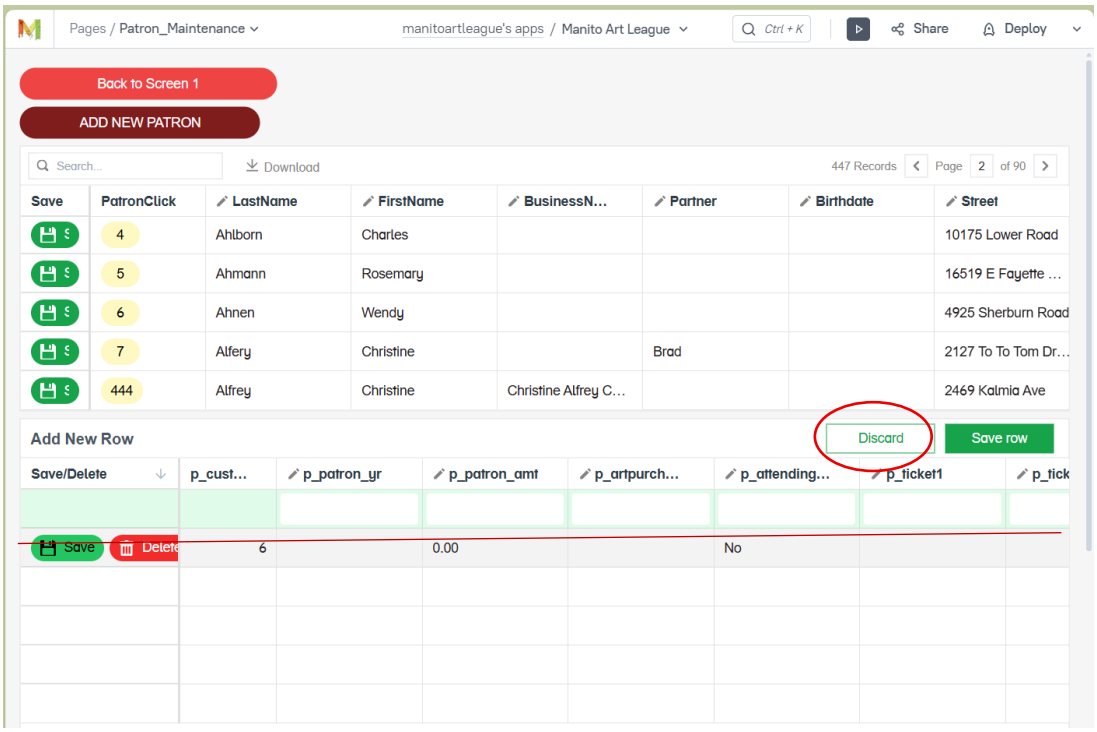


- **OR** *If you see an empty row, you can use that row to make it the new one by adding the values and Clicking the green Save.*

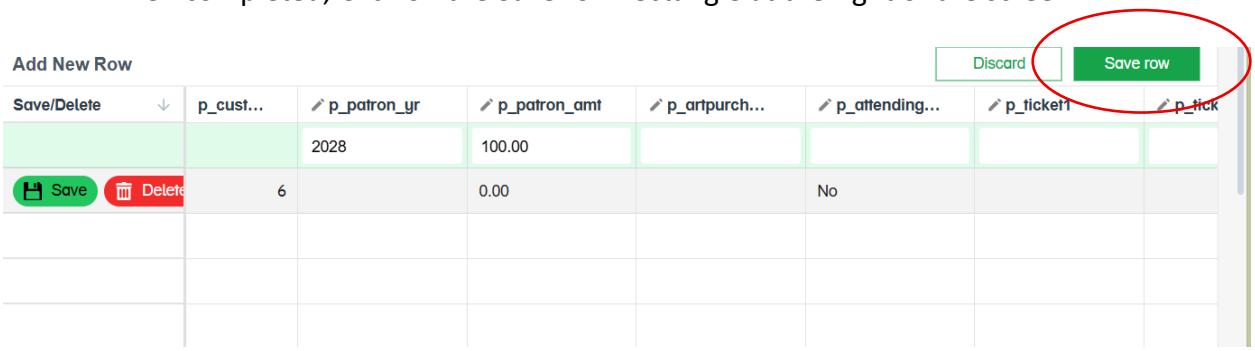


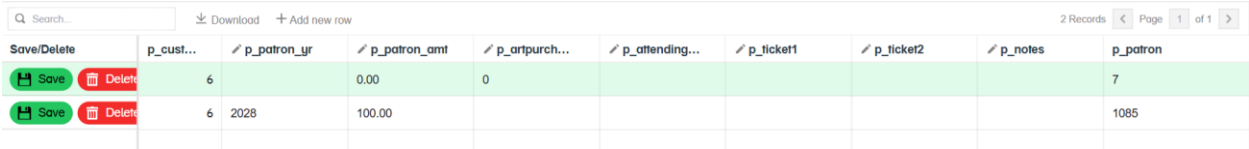
Otherwise…….

- A blank row will appear on top the records.
- If you change your mind before clicking save and need to cancel it out, ---You can click on Discard rectangle on the right, that will remove the row. If you already added a row, you can delete it later (see delete instructions)



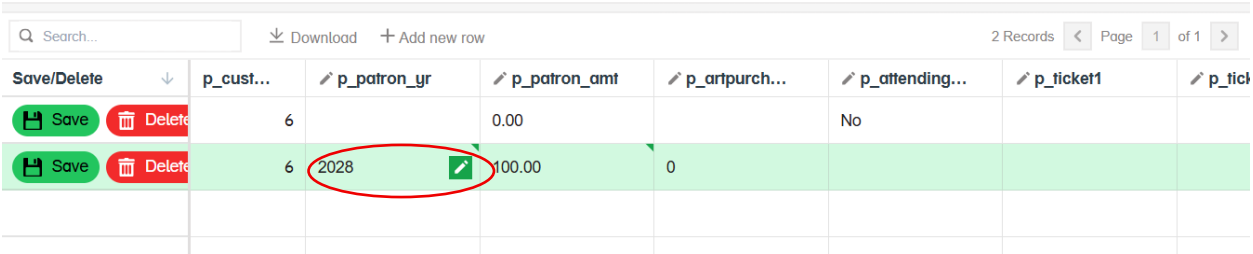
- Enter the information on the row
- When completed, Click on the Save row rectangle at the right of the screen.



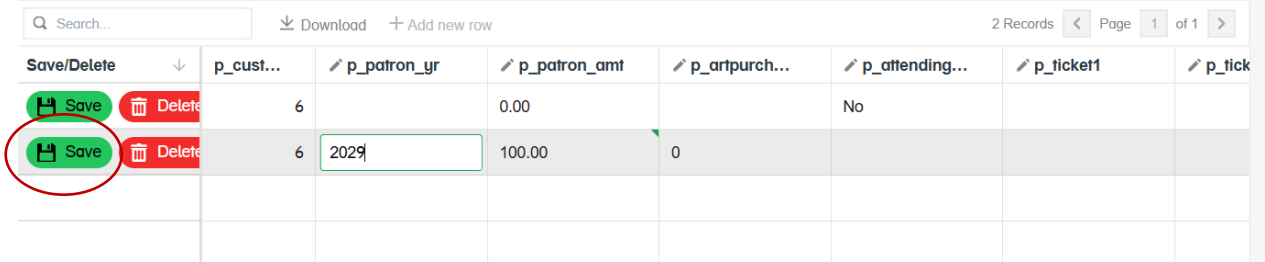


TO EDIT A ROW:

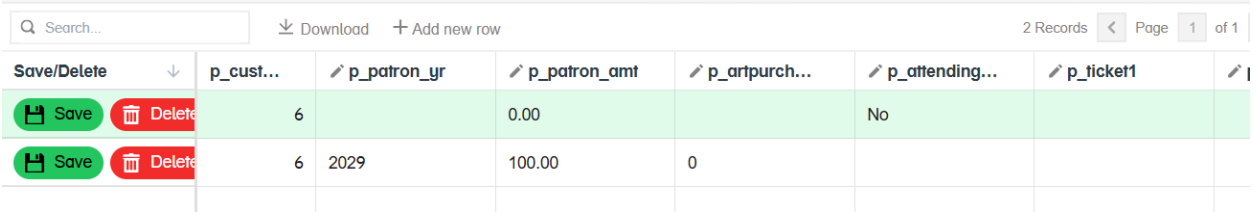
- Select your row
- Click on the right side to get the green pencil and edit your fields. You can edit the whole row or any fields at the same time in that One row.



- Make your edits and Click on Save (Disk icon)

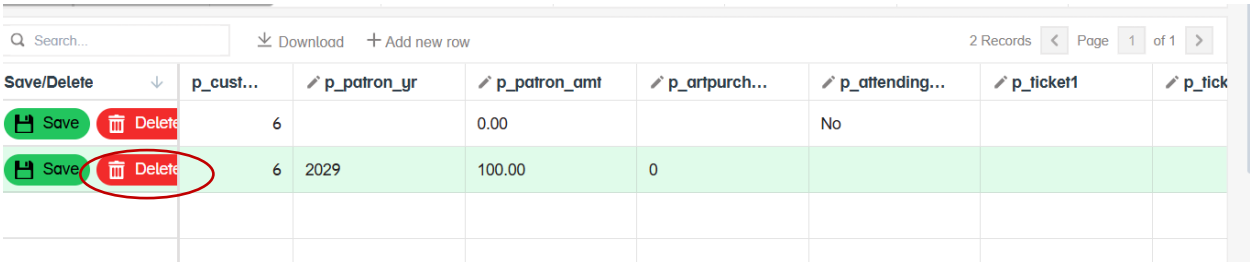


- And the updated record is here.
- You can add, delete or edit any other records while you are on this screen.

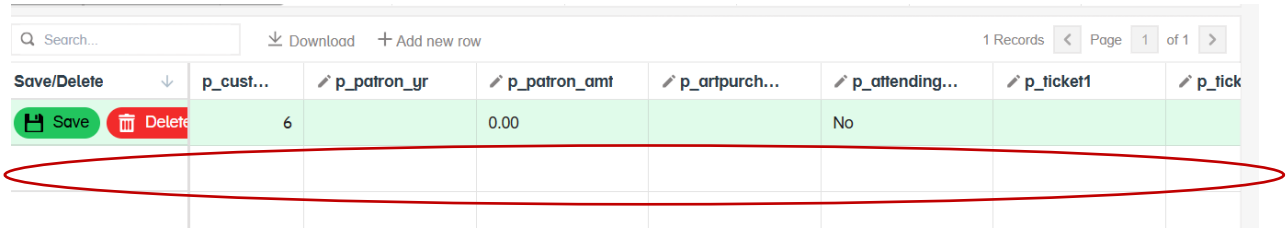


TO DELETE A ROW:

- To delete a row, click on the row, You will see it highlights in green.
- Click on the RED Delete button (Trash Can icon)

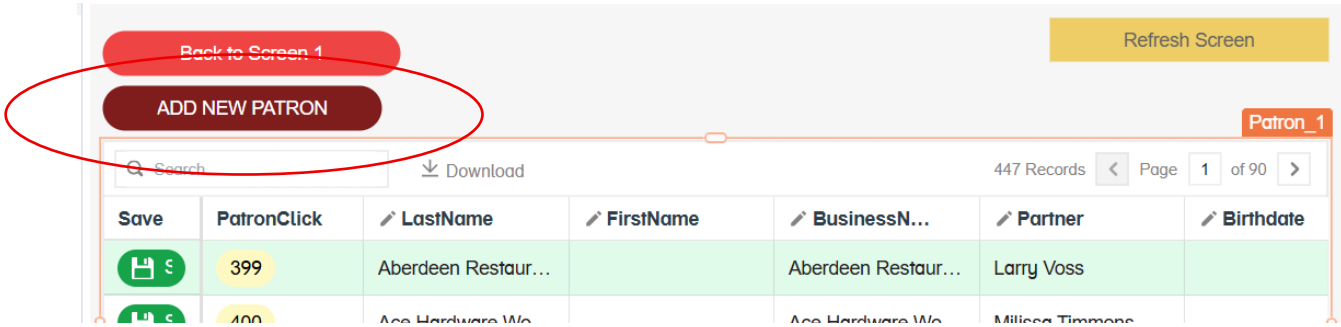


- You will see the row is removed.

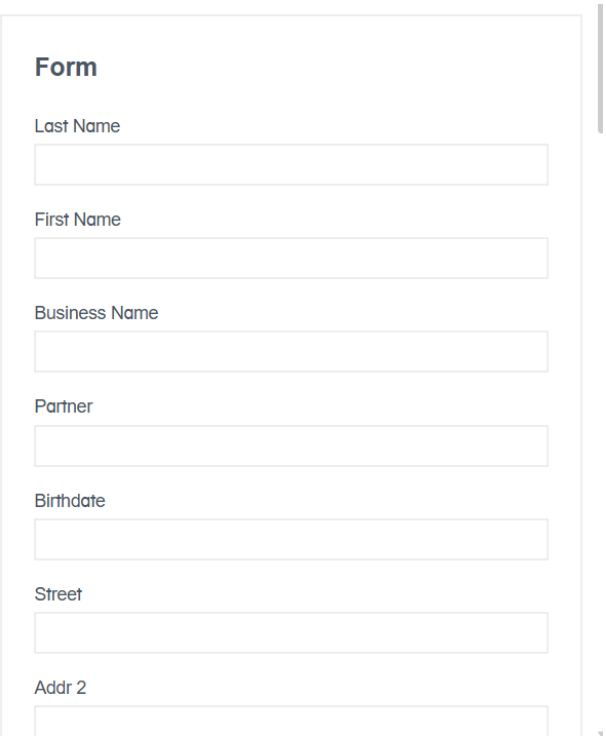


ADDING A NEW PATRON RECORD:

- Click on the ADD NEW PATRON BUTTON



- This will pop up an empty form display to enter the new patron member
- Please follow the entry RULES on the first page.



- Fill in the fields all the way down to the bottom that need to be filled in
- Fill in the needed information down the whole list….

Form

Last Name

Jotest

First Name

Testing

Business Name

Joetest Company

Partner

Mary

Birthdate

Street

123 Main Street

Addr 2

City

Cell Phone

606-529-4563

Notes

Business Use

Yes

Mal Member

Member Yr

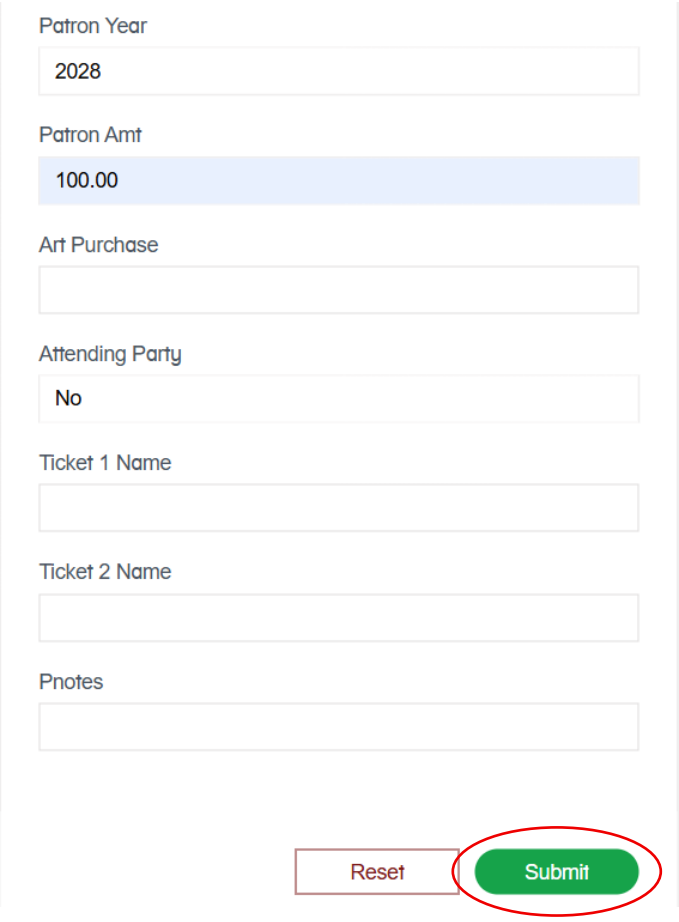
Single Family

Patron

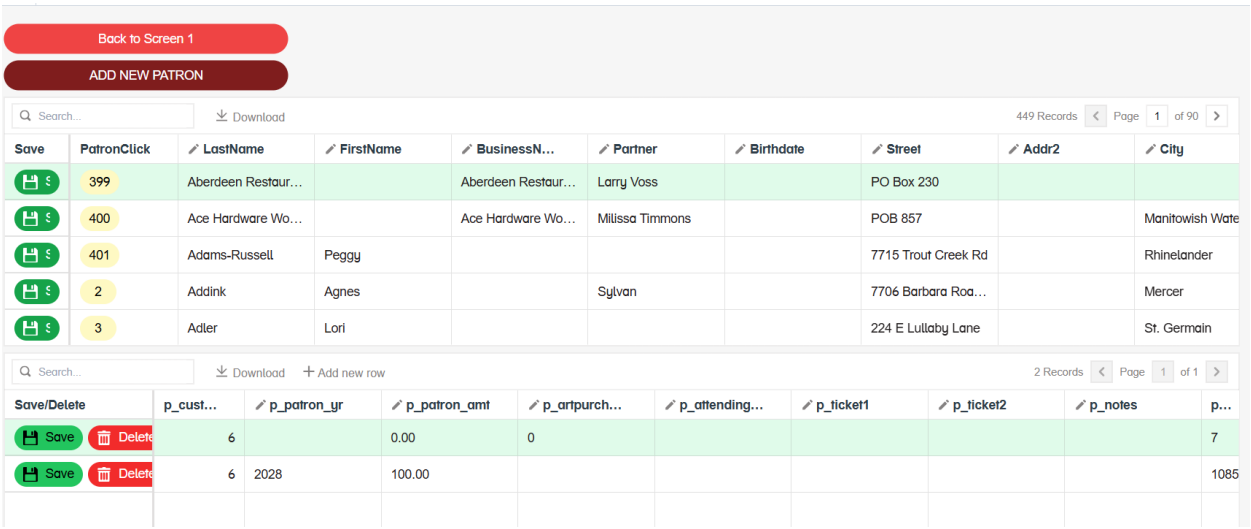
Yes

Member Patron Yr

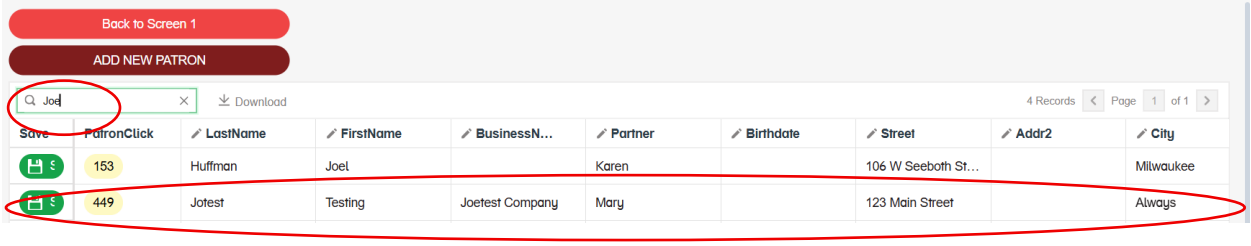
2028



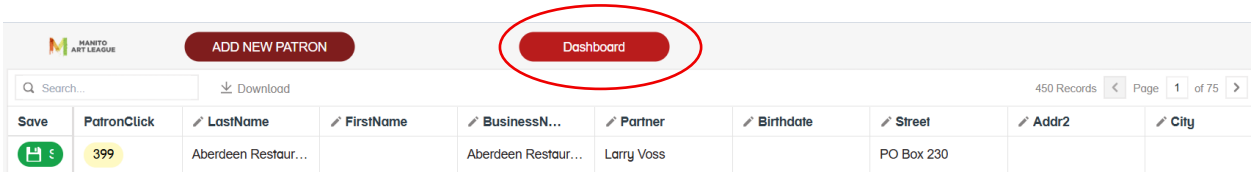
- When you complete all the fields that need to be entered, all the way to the botton, Click Submit
- After Clicking the Submit, it will return you to the screen



- To see the new entry, Search the New Patron Member



- When done or for reporting – click back to dashboard



- To get to your Reports page, click on the reports button.

- Select the link you want to see in reports. You will not be able to get back to the dashboard page at this time. Please see Report instructions for more information.
- All reports are able to sort, filter, etc.
- Let me know if you want changes to your reports.